

ABSTRACT

In 1982 the National Park Service (NPS) established the Historic Leasing Program to lease historic structures and agricultural lands to individuals and organizations. As authorized by Section 111 of the National Historic Preservation Act of 1966, as amended, the program is designed to spur rehabilitation and reuse of designated historic structures and land owned by the Federal Government. In order to be considered for lease, a property has to be owned by the Federal Government, listed in the National Register of Historic Places, and not be appropriate or necessary for use in the park's administration, management, interpretation or concession operations. Any proceeds from these leases are used to maintain, repair, and preserve NPS historic properties and to defray the costs of administering the leasing program.

Under the auspices of the Historic Property Leasing program, the NPS hereby issues this Request for Proposal (RFP) to lease the Plum Orchard property, which consists of a building complex and grounds located at Cumberland Island National Seashore, Georgia, USA. The RFP seeks to solicit lease proposals from organizations, associations, or individuals to preserve and protect the property, and to adaptively re-use Plum Orchard Mansion for compatible public and/or private use. The goal is to allow a non-governmental lessee to make use of this structure in a manner that will preserve it, with uses that are financially sustainable. The property is listed in the National Register of Historic Places.

While the NPS considers the Historic Property Leasing program to be the appropriate method for the rehabilitation of Plum Orchard, the NPS is willing to entertain proposals for commercial services that would be under a concession contract instead of a historic lease. If an expression of interest for commercial services were received, a concessions prospectus would be prepared in accordance with the National Park Service Concessions Management Improvement Act of 1998. Upon release of the prospectus, interested applicants would be able to make an offer in response to the prospectus.

The NPS is willing to entertain any proposal that is compatible with the requirements of the RFP. Respondents to this request may be individuals or organizations, corporations, or public agencies, and may have a profit or nonprofit status. All proposals must be compatible with the NPS's mission to preserve the Nation's heritage and will be subject to the NPS's planning and operational guidelines. Proposed uses must also be compatible with the mission of the park:

Cumberland Island National Seashore is dedicated to preserving the island's primitive character, natural processes, and the natural, cultural, historic, and wilderness resources, while offering visitors a feeling of isolation and wonder, and an opportunity to understand, learn about, and appreciate this island paradise.

LEASING OF PLUM ORCHARD

A wide range of proposals for the use and operation of the Plum Orchard property will be considered. Under the guidelines of the Historic Property Leasing program examples of potential uses that would be considered include, but are not limited to:

- office
- residence
- corporate retreat facility
- research and educational training facility that concerns resources of the National Park System, such as a field school

The NPS may also consider entering into a lease with any person or governmental entity for the use of buildings and associated property administered as part of the National Park System (under USC 16 C 1a-2(k)).

Proposals received will be analyzed in detail with respect to a series of evaluation factors. Set forth in the section "Evaluation Factors," these factors are presented so that all parties will know the standards by which proposals will be judged.

The NPS retains the option to accept or reject any and all proposals. The final acceptance of any proposal will be conditioned upon the satisfactory negotiation and execution of the lease, and the approval thereof by the Director of the NPS or his/her representative.

By participating in this process, all parties agree that concepts and approaches expressed in their proposals and the proposals themselves become United States Government property, open to disclosure under the Freedom of Information Act.

If the proposer believes that the proposal contains trade secrets or confidential or financial information exempt from disclosure under the Freedom of Information Act (5 U.S.C. 552), the cover page of the proposal shall be marked with the following legend:

The information specifically identified on pages of this proposal constitutes trade secrets or confidential commercial and financial information that the proposer believes to be exempt from disclosure under the Freedom of Information Act. The proposer requests that this information not be disclosed to the public, except as may be required by law. The proposer also requests that this information not be used in whole or part by the government, except for purposes of evaluating this proposal.

Phased Treatment Program for Stabilization and Rehabilitation

The NPS has already begun implementation of a phased treatment program for the stabilization and

rehabilitation of the Plum Orchard property; however, funds have not been appropriated for the entire program. To date, funding has been appropriated for Phase I only. NPS implementation of Phase I will provide stabilization and critical structural repairs for the exterior envelope of Plum Orchard Mansion, the primary structure on the property. Completion of Phase I is scheduled for late summer, 2001. Any NPS funding for Phase II and III would be subject to congressional appropriations, which are not assured at this time. Therefore, any or all NPS funding for Phase II and III of the treatment program cannot be specified. The "Proposal Form" indicates the option for the proposer to assume all or part of the funding and work described by Phase II and III, which would complete the treatment program. Proposals that provide funding for Phase II and III work will receive a higher proportionate rating under the evaluation factors for analyzing proposals. See Appendix B for detailed information on Phase II and Phase III of the treatment program, including NPS Class C cost estimates.¹

To ensure the preservation of the historic elements of the Plum Orchard structures and landscape, the NPS has developed historic resource treatment requirements that the lessee must follow in carrying out the rehabilitation program. The lessee will carry out timely and appropriate treatment of these elements in accordance with the Historic Structure Preservation Guide, Cumberland Island, Volumes I and II. The NPS will work cooperatively with the lessee to ensure that the proposed treatment satisfactorily preserves the character-defining features of the historic structures and landscape. The NPS will retain approval authority over the rehabilitation and maintenance of the structures and grounds. Rehabilitation work by the lessee will be allowed to start only upon the completion of all stabilization and rehabilitation work implemented by the NPS, which currently consists only of Phase I of the treatment program.

The Phase II and III of the treatment program will be reviewed pursuant to NPS compliance responsibilities under Section 106 of the National Historic Preservation Act of 1966, as amended. No work will be allowed to commence until the NPS has reviewed and approved the treatment program and full compliance under Section 106 has been completed. As previously stated, proposals that assume all or part of the funding for the total cost of this work (Phase II and III of Appendix B) will receive a higher proportionate rating under the evaluation criteria than those proposals that incur no cost.

The NPS will consider proposed uses of the historic lease property that are compatible, nonpolluting, visually nonintrusive, and in accordance with the requirements and conditions described herein. In consultation with the lessee, the NPS will establish parameters for regular public visitation to the Plum Orchard grounds and buildings, which will be limited to daylight hours.

The NPS will consider a range of lease terms (with a renewable option), taking into account: investments that the NPS may require of the lessee; common practice for this type of lease; and other relevant factors. The NPS may negotiate lease terms that will balance the investment capital

¹ Class C estimates are conceptual cost estimates based on square foot costs of similar construction or identifiable unit of similar construction items, and may also take into account such factors as anticipated construction restraints or unusual site conditions.

needed and the rental fee required; however, lease terms must be sufficient to return to the Government the estimated fair rental value of the rehabilitated property in terms of rental payments as adjusted over time, lessee development costs, and/or a combination of these elements. The NPS may choose to reject all proposals received at any time and re-solicit or cancel the request for proposals altogether when it is in the best interest of the Federal Government. If the proposal is accepted, the NPS will enter into a lease with the party involved under the authority of Section 111 of the National Historic Preservation Act, and in accordance with 36 CFR 18, the regulations governing the historic property leasing program. (See Model Lease, Appendix D).

Requirements and Evaluation Criteria

Prospective bidders are urged to visit the Plum Orchard property. The NPS requires proposers to submit specific, detailed rehabilitation and financial plans and statements of management capability. The NPS will consider proposals on the basis of their effect on the historic scene and wilderness values of the park and on the effect of any proposed alterations on the historic character and fabric of the structure(s). The qualifications of the proposers will be evaluated by the NPS to assure that prospective lessees have the experience and financial capability to carry out the terms of the lease. Criteria by which proposals will be evaluated are set forth in the Plum Orchard proposal form (attached). In addition, this RFP includes legal, historical and physical data on the structures available for lease, and proposal submission requirements.

In leasing historic properties, the NPS may legally consider a lease term of up to 99 years. For Plum Orchard, the NPS will consider a range of uses and lease terms commensurate with the proposed investment. The proposal must be sufficient in its economic return to the Federal Government to meet the estimated fair rental value of the property in its restored condition in terms of rental payments, lessee development costs, or a combination of those elements. The rental rates will be readjusted at the end of the 5th year of the lease based on a market rent study. The procedure will continue every subsequent 5 years over the term of the lease.

In evaluating the proposed term of the lease, the NPS will take into account investments which may be required of the lessee, common practice for the type of lease, and other factors. If a proposal is accepted, the NPS will pursue with haste a contractual agreement under an Agreement and Lease with the party involved under the authority of Section 111 of the National Historic Preservation Act of 1966, as amended. The NPS may choose to reject all proposals received at any time and re-solicit or cancel the request for proposals altogether when it is in the best interest of the Government.

Open Period

Proposals will be accepted until 4:30 PM local prevailing time on December 21, 2001. **Please send proposals to the attention of John Barrett, National Park Service, Atlanta Federal Center, 1924 Building, 100 Alabama Street, SW, Atlanta, Georgia 30303.**

Property Inspection

Potential lessees should inspect this property. **Open houses have been tentatively scheduled for 11:00 AM October 10 and 9:00 AM October 13, 2001.**

Reservations are required for the property inspection. To make a reservation, contact the Superintendent, Cumberland Island National Seashore, P.O. Box 806, St. Marys, Georgia 31558 or call the park at (912) 882-4336 at least one week prior to the scheduled site visit.

INTRODUCTION

THE NATIONAL PARK SYSTEM AND THE NATIONAL PARK SERVICE

By the Act of March 1, 1872, Congress established Yellowstone National Park in Montana and Wyoming "as a public park or pleasuring ground for the benefit and enjoyment of the people" and placed it under the control of the Secretary of the Interior. In the years that followed, other national parks and monuments were created, most of them carved from the Federal lands in the West. The Department of the Interior managed most of these areas, but the War Department and the Forest Service of the Department of Agriculture also managed other monuments and natural and historical areas. No single agency provided unified management of Federal park lands.

On August 25, 1916, Congress established the NPS in the Department of the Interior to provide cohesive administration of such areas under the Department's jurisdiction. According to its enabling legislation, the NPS was to "promote and regulate the use of ...national parks, monuments, and reservations" for the purpose of conserving "the scenery and the natural and historic objects and wildlife therein and to provide for the enjoyment of the same in such manner and by such means as will leave them unimpaired for the enjoyment of future generations." In 1933, an Executive Order transferred 63 national monuments and military sites from the Forest Service and the War Department to the NPS. This action was a major step in the development of today's truly national system of parks—a system that includes areas of historical as well as scenic and scientific importance. Congress declared in the General Authorities Act of 1970 "that the National Park System, which began with the establishment of Yellowstone National Park in 1872, has since grown to include superlative natural, historic, and recreation areas in every region...and that it is the purpose of the Act to include all such areas in the System..." Today, the National Park System of the United States comprises 383 units covering over 80 million acres in the United States, the Caribbean, and South Pacific.

MANAGEMENT OF CULTURAL RESOURCES

Although best known for its great scenic parks, over half the units of the National Park System preserve sites and buildings associated with persons, events, and activities important in the Nation's history. To preserve and protect cultural resources, the NPS has a responsibility to: "locate, identify, evaluate, preserve, manage, and interpret qualified cultural resources in every park in such a way that they may be handed on to future generations unimpaired." This policy is the fundamental cultural resources management mission of the NPS derived from the Act of August 25, 1916, and from historic preservation law.

CUMBERLAND ISLAND NATIONAL SEASHORE

Public Law 92-536 established Cumberland Island National Seashore on October 23, 1972, "to provide for public outdoor recreation use and enjoyment of certain significant shoreline lands and

waters of the United States, and to preserve related scenic, scientific and historical values...” The island is 17 miles long and totals nearly 34,000 acres of which approximately 17,000 acres are marsh, tidal creeks and mud flats. The Federal Government owns approximately 18,700 acres on the island.

Located off the southeast coast of Georgia, Cumberland Island was designated part of the National Park System due to its natural beauty and historical significance. Cumberland Island National Seashore is a remarkable seashore area of beach dunes, forest and uplands, and marsh. The outstanding beaches are enhanced by surf that is normally smooth and gentle. These beaches provide excellent opportunities for swimming, sunbathing, fishing and beachcombing. Other natural values on the island are conducive to activities such as hiking, camping, backpacking, boating, horseback riding, and nature study. Cumberland Island has also seen a succession of cultures dating back approximately 4000 years. Today, that history is still widely apparent by the existence of approximately 160 historic structures, an array of cultural landscapes, significant archeological resources, and numerous museum objects.

The island's landscape has been significantly altered since European occupation starting in the 16th Century. At present, much of the island has reverted to a more natural state. Piles of shells, called middens, provide clues to the lives of the Native American inhabitants who left them. An occasional pot shard indicates that Spanish soldiers and missionaries were here in the 17th century. During King George's War in the 1740s, General James Oglethorpe, founder of the Georgia colony, fortified Cumberland Island against the Spanish with Fort St. Andrew at the north end of the island and Fort Prince William at the southern end. Revolutionary War hero General Nathanael Greene purchased land on Cumberland Island in 1783. His widow, Catherine Greene, constructed a four-story tabby home that she named Dungeness. In the 1890s, the Settlement was established for black workers. The First African Baptist Church, established in 1893 and rebuilt in 1937, is one of the few remaining structures of this community. Thomas Carnegie, brother and partner of steel magnate Andrew Carnegie, began building, with his wife Lucy, on Dungeness' foundations in 1884. The ruins of this mansion remain today. Plum Orchard, an 1898 Classical Revival-style mansion built for Lucy's son, George, and his wife, Margaret Thaw, was donated to the National Park Foundation by Carnegie family members in 1970. Their contribution, as well as funds from supporting foundations, helped win congressional approval for establishing Cumberland Island National Seashore.

Plum Orchard is listed in the National Register of Historic Places as a district, with documentation having been accepted on November 23, 1984 (Listing #84000265). Plum Orchard Mansion, the carriage house, the boathouse, pumphouse, and octagon shed are buildings and structures that contribute to the significance of the district. The district is significant under National Register Criteria A for its associations with the development of Cumberland Island as a winter resort by the Carnegie family and under Criterion C for its architecture, the product of the nationally prominent firm of Peabody and Stearns. Plum Orchard is representative of the private retreats created by America's industrialists in the latter nineteenth and early twentieth centuries and is revealing of the lives of the owners and the large staff of servants and workers who made a luxurious existence possible.

An important NPS management issue at Cumberland Island National Seashore is the fact that Plum Orchard is surrounded by designated wilderness. Consequently, this formal designation creates special property access conditions that must be taken into account by any potential lessee. These conditions are explained in further detail below.

LEASING OF PLUM ORCHARD SPECIAL PROVISIONS

The following proposed Special Provisions are intended to convey concepts only and the actual final wording may differ somewhat in the lease of the property. Further, these special provisions may not represent all that appear in the lease.

(1) The lessee will be required to carry out the program of rehabilitation of Plum Orchard for adaptive use (see Appendix B) in accordance with the Secretary of the Interior's Standards for the Rehabilitation (see Appendix A) and the Historic Structure Preservation Guide, Cumberland Island, Volumes I and II. The lessee must submit to the NPS proposed project plans, construction drawings, and other documents needed for the preparation of an Assessment of Actions having an Effect on Cultural Resources (Form 10-106) in compliance with Section 106 of the National Historic Preservation Act of 1966, as amended. The NPS will oversee the preparation of that documentation and will coordinate the Section 106 compliance process on behalf of the lessee. Work may not proceed prior to receiving Section 106 clearance. After completion of compliance and the obtaining of NPS approval for all plans, the lessee will be allowed to proceed with the rehabilitation of the historic property covered by this lease. In accordance with the Secretary of the Interior's Standards, reconstruction of the carriage house and boat house, which no longer stand, may be included in a proposal at the proposer's option.

(2) All lessee activities pursuant to this lease shall be subject to the laws and NPS policies governing Cumberland Island National Seashore, and the rules and regulations promulgated thereunder, whether now in force or hereafter enacted and promulgated and must be consistent with the park's General Management Plan and subsequent approved Wilderness Management, Resource Management (Natural Resources and Cultural Resources), Long Range Interpretive and Commercial Services Plans.

(3) The NPS reserves the right to enter the area and all structures covered by the lease at any time for law enforcement purposes and at periodic scheduled times to inspect the premises to determine adherence to the provisions of the lease and approved rehabilitation plans. If the NPS has reason to believe that a breach of the lease is occurring, it may inspect the premises without notice. The NPS will otherwise not interfere with the lessee's quiet enjoyment of the premises.

(4) The lessee recognizes and acknowledges that Plum Orchard is adjacent to a wilderness area which is subject to the restrictions of use set forth in the Wilderness Act (16 U.S.C. 1131 *et seq.*) and the Cumberland Island Wilderness Act of September 8, 1982 (96 Stat. 709) and the guidelines found in the Cumberland Island National Seashore Wilderness Management Plan. Because of its proximity to a wilderness area, special care must be taken in the administration of Plum Orchard so as to carry out the NPS's obligations enumerated in the above-referenced acts.

Minimum Requirement Process. Determining NPS access to Plum Orchard is guided by its obligations under the Wilderness Act, the Cumberland Island Wilderness Act, and the

National Historic Preservation Act. Plum Orchard is bordered on three sides by wilderness, and Congress urged the NPS to use boat transportation for its preservation tasks. Therefore, the NPS has applied the minimum requirement process to determine the number of overland trips to Plum Orchard once full facilities become available. Full facilities include adequate docking and loading and off-loading ramps (designed to accommodate a garbage or dump truck not to exceed 50,000 pounds), boats to haul equipment and machinery, and boats to carry staff and visitors.

The objective of the minimum requirement analysis is to preserve the wilderness character of an area while managing for its public purposes. In applying the minimum requirement, the potential disruption of wilderness character and resources are considered before, and given significantly more weight than economic efficiency and convenience.

Pursuant to the Cumberland Island National Seashore Wilderness Management Plan, the minimum requirement process will be two-tiered. First, a determination will be made as to whether a proposed management action is appropriate and necessary for the administration of the area as wilderness and does not pose a significant impact to its wilderness resources and character. Second, if the project is found to be appropriate and necessary, the minimum requirement process will be used to determine the method (tool or technique) that causes the least impact to the physical resources and experiential qualities of wilderness.

Vehicular Trips. The NPS has identified the types of tasks it will perform during the rehabilitation and operational phases of Plum Orchard. During the rehabilitation phase, the NPS estimates that about 34 vehicular trips to Plum Orchard per week will be needed by the construction crews (including the moving of materials and equipment), supervisors and architects, those retrieving materials and tools from the Dungeness maintenance shop, the curatorial staff, and construction supervisors. During the operational phase, the NPS estimates that interpreters (and visitors), custodial workers, curators, maintenance staff, and supervisors will make about 27 trips per week to Plum Orchard. Occasionally, the NPS will transport equipment and materials for cyclic maintenance projects.

The estimated number of trips identified for the rehabilitation and operational phases of Plum Orchard represent the number of proposed trips needed by vehicle. These estimates take into account that most shipments arrive by boat, and visitors arrive by boat or by foot. The numbers may fluctuate on a weekly basis; the numbers 34 and 27 represent an average. Once full facilities become available, the NPS estimates that it will make about five round trips by boat weekly during the construction-rehabilitation phase. Similarly, the NPS will make about three round trips weekly during the operational phase. Under the concept of “no net increase in impact,” the occupant will follow the practice of the NPS if it were to preserve, restore, and operate Plum Orchard.²

² The term “no net increase in impact” means that level of impact reasonably anticipated if the NPS were meeting its obligations to restore, maintain, and preserve Plum Orchard Mansion and provide visitor access and interpretation at least equal to that of the prospective tenant.

To ensure that trips through the wilderness will be kept to a minimum, planning and scheduling ahead will dictate that staff not involved in the direct transportation of material and equipment will travel to Plum Orchard by boat either from Dungeness or the mainland. Most of the time the NPS will bring materials and equipment directly from the mainland to Plum Orchard. For safety reasons and to avoid double loading and unloading, vehicles will occasionally be needed to transport equipment and materials from Dungeness, located at the south end of the island, north to Plum Orchard.

Use of Vehicles. Although the NPS or its agents may use the Main Road and Plum Orchard Road to transport staff and materials to perform the selected preservation/rehabilitation treatment and cyclic maintenance projects on the structures and landscape at Plum Orchard, every attempt will be made to use boats for these purposes. The NPS or its agents will use boats landing at the Plum Orchard dock for routine maintenance activities.

The lessee shall maintain at least two boats for ingress to and egress from Plum Orchard. These boats shall be moored at the pier located on the Brickhill River that serves Plum Orchard. The lessee's boats shall at all times be maintained in seaworthy condition. Both boats and operators must meet appropriate U.S.C.G. licensing and specifications.

The lessee may also maintain at Plum Orchard one motorized vehicle, not exceeding 10,000 lbs. gross vehicle weight. This vehicle may be operated within the area shown in Exhibit D for any purpose authorized under this lease, as set forth in a permit to be issued by the NPS. When not in use, the vehicle will be parked in a discrete location in a manner that will not mar the historic setting. In addition the vehicle may be used outside the area shown in Exhibit D in the following circumstances:

- emergencies involving health and safety, as defined by the Wilderness Act;
- during rehabilitation and maintenance of the grounds and structures of Plum Orchard in conformity with the lease and as approved by the Superintendent; use of the vehicle for these purposes is limited to those occasions when the use of boats would be impracticable or dangerous, as determined by the Superintendent, and in conformance with the concept of “no net increase in impact” as described above;
- if the lessee's boats are inoperable due to mechanical problems or periodic haul out, and under special use permit issued by the Superintendent; repairs will be made in a timely manner and maintenance performed according to a regular schedule.

(5) Special events may be allowed at Plum Orchard subject to the lessee applying for and the Superintendent approving a Special Use Permit. In order to reduce impact on the adjacent wilderness lands, the lessee shall not permit activities that audibly or visually cause a negative impact on the adjacent wilderness area or are inconsistent with the purposes of the historic district as determined by the Superintendent.

The lessee also recognizes and acknowledges that the Plum Orchard Boat Dock may be used by various parties for ingress to and egress from the park, including the transporting of equipment, materials and supplies, and the staging of various activities. The NPS or its agents will employ the boat dock as a principal receiving point. Whenever possible NPS staff will prepare materials at Plum Orchard prior to transport to destinations within the Wilderness. Use of the boat dock for these and other purposes will be pursuant to the express permission of the NPS. The lessee also recognizes and acknowledges that currently allowed staging activities by hunters near Plum Orchard will expire in 2005, at which time those activities will no longer be permitted.

(6) After rehabilitation is completed the lessee will make Plum Orchard Mansion available for park-conducted public tours from 11:00 AM to 1:00 PM at a minimum of twice weekly. The Plum Orchard grounds will also be available to the public daily from 8:00 AM to 5:00 PM. The areas open to the public and the hours of guided, public tours will be negotiated with the lessee.

(7) The lease period may span a range of years and may be renewed if the lessee satisfactorily adheres to all the conditions and special provisions of the original lease.

(8) The lessee will be allowed up to two years from the date the lease is awarded to complete the necessary project planning, including all construction documents. Upon the lessee's completion of the plans, the NPS will have a 90-day review period. Work will commence within 90 days after NPS approval of the plans, and will be pursued to completion in accordance with the approved plans. If work has not begun after two years the lease becomes null and void unless the NPS grants an extension. The NPS will offer planning assistance, as necessary.

(9) The residency occupancy of Plum Orchard Mansion and any NPS approved reconstructed structures will be contingent on their capacity and their impact on the historic scene and the wilderness.

(10) All permanent improvements of Plum Orchard Mansion and surrounding buildings shall be deemed property of the United States at the termination of the lease. Any personal property not removed within 60 days of the termination of the lease shall become the property of Cumberland Island National Seashore.

(11) The lessee shall purchase and maintain during the term of the lease and any subsequent extensions, Comprehensive General Liability Insurance of not less than \$100,000 per person and \$500,000 per occurrence for bodily injury and \$20,000 per occurrence for property damage. In addition, the lessee shall provide and maintain a fire insurance policy on the lease properties that equals the fair market value of the properties as determined by the NPS appraisal done in conjunction with the lease. The fire insurance policy amount will be adjusted five years after the date of the agreement and every five years thereafter according to the Consumer Price Index. The policy shall name the United States as an additional insured, and shall specify that the insured shall have no right of subrogation against the United States for payment of any premiums or deductibles due. In the event of a fire loss the funds will be used to repair, restore and/or replace the damaged

or destroyed property by the lessee.

(12) When the lands of Cumberland Island were acquired for establishment of the park, many landowners retained reserved estates. Most of these estates have not expired and are treated as valid existing rights under the Wilderness Act. The lease agreement will neither expand nor diminish legal existing rights.

Trips by the lessee of Plum Orchard in vehicles operated by owners of real property or real property interests on Cumberland Island shall be permissible and shall not have any impact on the “no net increase in impact” calculation or the number of trips transferred by the NPS to the lessee. Further, no person who is present on the island by virtue of this lease may accept the assignment of any of the rights of an in-holder or holder of a retained right estate or accept the status of guest of an in-holder or holder of a retained right.

(13) Pursuant to Sec. 301(3) of Public Law 91-646, the NPS has established \$19,600.00 as the fair market rental value per month for Plum Orchard based on an appraisal report completed as of January 11, 2001, and approved April 5, 2001. The appraisal is based on the complete rehabilitation of Plum Orchard as indicated by Phases I, II, and III of the rehabilitation schedule. Six months before Plum Orchard is ready for occupancy and every five years thereafter, the NPS will update its appraisal to establish the fair market value rent, which will then be reflected in the lease.

The lessee shall be required to pay fair market value rent. The lessee will not be responsible for paying rent until the date of occupancy, January 1, 2004. This payment shall be deferred until the initial rehabilitation costs incurred by the lessee are amortized. The rental payment deferral period will be computed by dividing the initial rehabilitation costs incurred by the annual fair market value rental. Also included in the deferred rental period will be major maintenance and upkeep costs such as periodic painting and roofing and replacement of major appliances and mechanical systems.

(14) The lessee will be allowed to take possession of the Plum Orchard property only upon the completion of stabilization and rehabilitation work undertaken by the NPS, which currently consists of Phase I only.

TAKE NOTICE

The NPS:

- has the right to refuse any or all submissions;
- has the right to reject any of the consultants listed by the proposer;
- strongly advises that proposers inspect the site prior to making their submissions;
- will not permit assignment of the project without its approval; and
- assumes no responsibility to provide the lessee with water, sewage, electricity, and telephone service at the property; the lessee shall assume responsibility for all of these services.

FILING OF PROPOSALS

All proposals, cover letters, and modifications must bear the authorizing signature and title of the official empowered to represent the organization making the proposal. It is the responsibility of the proposer to deliver one copy of the proposal in a sealed envelope to the NPS prior to the appropriate deadline, whether by mail, courier, or in person. The exterior of the delivery envelope or package should prominently bear the clear designation, "Plum Orchard Proposal," as well as the name and address of the proposer.

All proposals must be received at the offices of the National Park Service, Atlanta Federal Center, 1924 Building, 100 Alabama Street, Atlanta, Georgia 30303 by 4:30 PM, December 21, 2001 . Please send proposals to the attention of John Barrett.

If a proposal delivered by the U.S. Postal Service arrives after the deadline, it will not be considered unless:

It was sent by Registered or Certified mail not later than five (5) calendar days prior to the date specified for receipt of offers.

It was sent by mail and the government determines that the late receipt was due solely to mishandling by the government installation: or

It is the only proposal received.

Proposals may be withdrawn or modified by written notice, provided such notice is received prior to the hour and date specified for receipt. Furthermore, proposals may be withdrawn by written notice received at any time prior to the signing of the lease, or in person by a proposer or authorized representative, provided the person's identity is made known and the person signs a receipt for the proposal.

The NPS reserves both the right to reject proposals which fail to comply with the delivery requirements and the right to waive any of these requirements.

SCHEDULE

OPEN HOUSE:

The NPS has tentatively scheduled making the property available for examination by potential proposers on: **October 10, 2001 from 11:00 AM to 2:00 PM** and **October 13, 2001 from 9:00 AM to 12:00 PM.**

The NPS urges potential proposers to visit the site to understand the logistical difficulties of operating from Plum Orchard. Because access to Cumberland Island National Seashore is limited, the NPS will arrange transportation from St. Marys. **Reservations are required for the property visit.** To make a reservation, contact the Superintendent, Cumberland Island National Seashore, P.O. Box 806, St. Marys, Georgia 31558 or call the park at (912) 882-4336 at least one week prior to the scheduled site visit.

PRE-SUBMISSION INFORMATION MEETING

A pre-submission meeting for potential respondents will be held at **6:00 PM, October 2**, at:

Camden County Library
1410 Hwy 40 E.
Kingsland, GA 31548
(912) 729-3741

The meeting's purpose is to review the requirements of the RFP and to answer any questions that may arise concerning the provisions of the document. Respondents should indicate their intent to attend the pre-submission meeting by contacting the park at (912) 882-4336 by September 28, 2001. The park can also provide directions to the library. A summary record of questions and answers will be made available. Only one such meeting will be held.

PROPOSAL DUE DATE:

The deadline for submitting proposals is December 21, 2001, 4:30 PM ET.

EVALUATION COMPLETION DATE:

The NPS evaluation will be completed by February 28, 2002.

EVALUATION PANEL

The Director of the NPS or his/her representative will make the final decision, but evaluation of proposals and recommendation to the Director will be the function of a special NPS Evaluation Panel comprising several categories of membership.

Park Management

Park Operations

Cultural Resources Management

Professional Services

Evaluation of proposals by the Panel will be based solely on graphic and written material submitted by the proposers. Personal interviews will not be held.

EVALUATION FACTORS

The NPS and the Evaluation Panel established under the terms of the Request for Proposals, will, at a minimum, employ the six factors set forth below in assessing proposals received.

- Scope and nature of proposed rehabilitation work.
- Conformance of the proposal to the Request for Proposals.
- Experience: Evidence of a similar historic preservation project; evidence of the proposer's reliability as a property owner.
- Expertise: Evidence of credentials in the areas of development, finance, and/or property management.
- Financial Capability: Evidence that the proposer has the financial resources to undertake the project.
- Compatibility of proposal with the historic district, wilderness, and the national seashore.

The key evaluation principle that the NPS wishes to stress is that (performance of all other factors being equal) proposals that best facilitate the preservation and maintenance of Plum Orchard will be viewed most favorably in the evaluation process.

Individual criteria relating to the five factors above have been identified. The following criteria further define the factors:

Impacts of the Proposal on the Historical Significance and Integrity of the Structures

- Treatment—proposed stabilization, preservation, or rehabilitation activities
- Land Use—suitability to historic use
- Building Use—suitability with historic use of each building on the site
- Preservation Maintenance—proposed activities and tentative schedule

Conformance of the Proposal to the Request For Proposals

- Preservation—consistency with the Secretary of the Interior's *Standards for Rehabilitation* (appended)
- Use—compatibility with local laws and NPS policies and regulations
- Utilities and Services—need for and cost of basic utilities and services
- Safety—compliance with local, State, and Federal law relating to fire, health, sanitation, and public safety

- Security—responsibility for protection of property against damage from fire, trespass, break-in and vandalism

Experience of Proposer

- Competence—general management and technical competence of proposer
- General understanding of process—awareness of technical, financial, legal and environmental issues associated with project
- Specialized skills—specialized skills in historic preservation projects, if applicable
- Experience—past record of performance on similar projects
- Conflicts—absence of personal and organizational conflict of interest

Financial Capability

- Overall Cost—initial capital cost and preservation maintenance expenses throughout the lease period (accounting for inflation and any other cost escalation factors)
- Financing—method including sources of financing for executing project
- Lease agreement—nature of lease the proposer believes will be required
- Insurance—financial ability to pay bona fide claims for bodily injuries, death or property damage as well as funds available to restore or reconstruct the property if it is destroyed or damaged.

LEASING GUIDELINES

REHABILITATION GUIDELINES

Plum Orchard Mansion: the rehabilitation guidelines that will apply to the mansion are discussed in detail in the Description of the Property section of this Request for Proposals.

Carriage House: the proposal may include reconstruction of the structure in accordance with the Secretary of the Interior's Standards.

Boathouse: the proposal may include reconstruction of the structure in accordance with the Secretary of the Interior's Standards.

Octagon Shed: any proposed use of the shed must preserve the exterior historic features of the structure.

Pumphouse: any proposed use of the shed must preserve the exterior historic features of the structure.

After the rehabilitation (and reconstruction), the NPS intends that the quality of site and building maintenance provided for the property shall meet the highest NPS standards.

USE GUIDELINES

The Plum Orchard property may be assigned or subleased as provided in the approved lease or concession contract; however, the minimum sublease term will be one (1) year and the sublease or assignment must be approved in writing by the authorized representative of the NPS. This requirement is intended to preserve the historic resources by eliminating the potential for damage created by short-term/seasonal renters.

The Plum Orchard property cannot be used for livestock, storage of unlicensed vehicles, trailers, etc. Household pets will be allowed subject to the approval of the Superintendent, Cumberland Island National Seashore. No activity involving ground disturbance will be allowed without prior NPS archeological clearance.

NEW STRUCTURES

No new structures such as garages, storage buildings, barns, etc. should be proposed for the Plum Orchard property. Likewise, major changes to the topography, vegetation, plantings, drive, etc., should not be proposed. As previously stated, reconstruction of documented historic structures will be considered pursuant to NPS Management Policies.

DESCRIPTION OF THE PROPERTY

THE SITE

The site is a portion of a former private resort home complex built for George Lauder Carnegie between 1898 and 1907. Site properties included in this RFP are Plum Orchard Mansion, a 30-room Classical Revival style mansion, a carriage house/stable that is in ruined condition, a boathouse, a pumphouse, and an octagon shed. Other outbuildings of the complex are included in retained rights agreements and are not included in this RFP.

The site is located on the west side of Cumberland Island, approximately nine miles from the southern tip of the seventeen-mile-long sea island. The site is bordered on the west by the Brickhill River and a wide expanse of marsh and surrounded on the remaining three sides by designated wilderness. Site topography is substantially level, with an elevation of approximately 10 feet above sea level. The resort complex was created on a site that had previously been cleared for use as a cotton plantation in the nineteenth century. The complex is situated in the approximate center of a prehistoric archeological site that extends some 3500 feet along the Brickhill River. Although this archeological site has been subject to previous disturbance, it retains the potential to yield information about the prehistoric cultures that occupied Cumberland Island.

Soils at the site are classified as Lakeland sand. Site vegetation largely consists of second growth forest on old fields and pastures. Typical vegetation on the upland portions of Cumberland Island includes live oaks, sabal palm, magnolia, red cedar, saw palmetto, loblolly and long-leaf pine, holly, and red bay. Immediately surrounding the buildings are the remnants of a designed landscape associated with the development of the complex, including palms and cedars planted along drives, live oaks, and lawns with vistas to the Brickhill River.

Access to site. Access to the site from the mainland is by boat only at docking space specified by NPS. NPS has the authority to impose limits on the size of boats allowed to dock.

Plum Orchard Mansion

Description. Plum Orchard is a two-and-one-half-story, five-part Classical Revival mansion constructed in three building campaigns between 1898 and 1907. Commissioned by Lucy Coleman Carnegie for her son, George Lauder Carnegie and his wife, Margaret Thaw Carnegie, Plum Orchard Mansion was designed in 1898 by Peabody & Stearns, a nationally prominent Boston-based architectural firm. Peabody & Stearns also designed the substantial additions to the house completed in 1902-1904 and 1906-1907.

As substantially completed in 1907, Plum Orchard is a 240' by 95' structure with thirty principal rooms, eleven bathrooms, and more than sixty service rooms and closets. The house and associated terraces occupy a gross footprint of 24,000 square feet (sf) with approximately 21,700 sf of net usable floor area spread across four floors.

Exterior

In the Classical Revival style, Plum Orchard displays a five-part organization consisting of a main block with hyphens (linking sections) connecting it to two wings (or pavilions) at the east and west ends. Although the main facade gives the appearance of symmetry, the two end pavilions are substantially different in size; the arrangement of window openings in the hyphens and end pavilions is also dissimilar. The entry (southern) facade is dominated by a full-height, four-column portico (projecting porch) in the Ionic order, centered on the main block and raised approximately four feet above grade and reached by a wide flight of steps. The portico features a deep entablature supporting a monumental pediment with a circular window in its center. The main block is topped by a hip roof that has two roof projections at the rear in addition to the projecting gable roof of the entry portico. Openings in the entry facade of the main block are entirely symmetrical: the double-doored main entry is capped by a fanlight with tracery and flanked by three tall round-arched windows on each side. On the second story are seven rectangular six-over-six double-hung windows. Windows on the rear (north) front of the main block are a combination of round-arched and rectangular types. A single door reached by steps and sheltered by an ornate canopy provides access at the rear.

The two-story connecting hyphens have gabled roofs and feature one-story connecting porticoes with balconies across their front (southern) facades. The connecting porticoes have balustrades at the first and second floors. Fenestration of the hyphens on the entry facade is similar to the main block, with round-arched windows on the first story and rectangular, six-over-six windows on the second story. The original endwall chimneys of the main block are now enclosed by the hyphens; a third chimney is present in the back (north) wall of the main block.

The west pavilion is a hip-roofed block with a shallow gabled projection at the west and a one-story hip-roofed porch extending fully across the west front. The porch is supported by paired and triple columns and features a balustrade. Windows are round-arched on the first floor and rectangular eight-over-eight double-hung sash at the second floor. There is one chimney in the western endwall.

The east pavilion is a complex structure that at its front is similar in size to the west pavilion, but extends deeply at the rear (north) to provide additional service space. The main portion of the east pavilion is two stories, with a one-story projection at the east that includes an incised corner piazza space. The main (south) facade of the east pavilion has a monumental Palladian (or Searlian) window, flanked to the east by a rectangular three-part window in the one-story projection. The portion of the east pavilion that projects at the back of the mansion has mostly six-over-six, double-hung sash windows. A two-story, balustraded piazza is present in the east front and a one-story piazza with balcony provides the main access to the service wing on the north front. The roof is hipped with complex projections, and three chimneys are present in this wing.

At the front of the house is a raised terrace or piazza flanking the entry portico. The main block and hyphens are visually linked by a cornice featuring dentil ranges and brackets under the eaves. Constructionally, the house is wood frame on brick foundations, with a coat of cement stucco

painted white. Columns, window frames, balustrades and some other elements are wood. Above the main entrance are garlands and other neoclassical designs in decorative plaster.

Interior

Basement. The basement contains finished and partly finished spaces totalling approximately 6,000 sf. that originally were used for storage, laundry, ice making, mechanical and electrical service, and coal bins.

First Floor. The front entrance to Plum Orchard opens onto a great hall measuring 25' 6" east to west by 31' 8" deep and 12' 6" high. At the back of the great hall is an alcove separated by two oak columns from the remainder of the room. A grand staircase rises at the back of the room with an inglenook beneath the stair landing. Flooring is quarter-grain oak, with riven oak paneling. The fireplace wall is pressed Roman brick, the stairhall is papered with stenciled burlap between oak pilasters, and the great hall ceiling has box beams forming coffers covered with stenciled canvas.

West of the great hall is the library, measuring 18' wide by 32' deep, with a fireplace in the west wall of the room, flanked by a single door to the left leading to the piazza and double doors leading to the gallery. The library has built-in bookcases of oak, oak woodwork, an oak floor, and wallpaper on the remaining wall surfaces.

Beyond the library to the west is the gallery, leading to a large drawing room at the west end of the house. The gallery has an oak floor, oak woodwork and oak built-in shelving, and wallpaper on the remaining wall surfaces. On the north wall of the room is a door to a storage closet and a staircase to the second floor. The south wall has a single door leading to the front piazza.

An opening leads from the long gallery to the drawing room, a space lit from three sides and featuring a fireplace in the west wall. The floor is oak, and paneled oak woodwork extends to within two feet of the room's ceiling. A single door to the north of the fireplace opens onto the porch at the far west end of the house.

To the east of the great hall is the dining room, measuring 18' wide by 20' deep, with a fireplace in the east wall. Just south of the fireplace is a single door to the piazza, while on the north is a door to the butler's pantry. The floor and door and window surrounds are oak, there is a painted chair rail, and the wall surfaces are papered with reproduction wallpaper. The north wall of the dining room separates it from a service corridor and a service staircase, which surrounds an elevator.

The front portion of the east pavilion is occupied by a swimming pool room that rises to the full two floor height of the pavilion, while the one-story extension on the far east contains a squash court. The rear portion of the east pavilion contains the kitchen, servants' hall, a service staircase, and other service spaces.

Second Floor. On the second floor, the west pavilion contains the master bedroom suite. The main block, hyphens, and front portion of the east pavilion contain guest bedrooms and associated

bathrooms and closets. The back portion of the east pavilion contains servants' bedrooms and baths. Most second floor spaces have painted plaster walls. The second floor hall is papered in the same stenciled burlap used in the great hall.

Attic. The attic contains approximately 3,000 sf. of floored space, including a servant's room and two large finished closets.

Plum Orchard Carriage House

The carriage house was a one-and-one-half-story, three-part, wood-frame structure with original overall dimensions of 124' wide by 43' deep, located about 100 yards east-southeast of the mansion house. The main entry facade was the 124' long, west front, which faces toward the mansion. The northern portion of the structure was devoted to carriage storage, the center section to carriage maintenance, and the southern section was a stable. In later years, the northern and center sections were used as garage space for automobiles. The carriage house is presently in seriously deteriorated condition, the roof and most of the walls having collapsed.

The structure has a foundation of brick that rises approximately 1' above grade, and a concrete carriage ramp runs through the center section in an east-west direction. The walls are sheathed with clapboards and the roof is wood shingle. Wooden scroll-form brackets, similar to those on the mansion, are present at the eave. The roof configuration was a north-south-running hip with a cross hip over the center section and gabled extensions at the east and west of the center section and a gabled hayloft extension on the south. Large doors for carriages were present in the east and west facades of the center section and a large door was also centered on the south front of the stable portion. Windows on the ground floor of the center section were nine-over-nine and double-hung. Windows in the stable and carriage storage sections were six light, and windows in the second story of the center section were six-over-six, double-hung sash. The east and west roof slopes had a number of hip-roofed dormers with six-over-six, double-hung sash.

Condition. The roof and walls of the Carriage House have collapsed. Any use of the carriage house will require a complete reconstruction of the structure in accordance with the Secretary of the Interior's standards. The building is a contributing feature of a National Register Historic District, and any reconstruction must respect the historic scene.

Plum Orchard Boathouse

The boathouse is a rectangular frame building on the bank of the Brickhill River west of the mansion house.

Condition. The boathouse is in a seriously deteriorated condition. Any proposed use of this structure would require that the exterior be reconstructed in accordance with the Secretary of the Interior's standards for reconstruction.

Plum Orchard Octagon Shed

The shed is an octagonal structure with stuccoed exterior walls that measure nine feet in width. The structure is located on the bank of the Brickhill River south of the boathouse and north of the dock.

Condition. The shed is in good condition. Any proposed use of the shed must preserve its exterior features which contribute to the significance of the Plum Orchard Historic District.

Plum Orchard Pumphouse

The pumphouse is an octagonal frame building with stucco applied to the exterior walls, which are nine feet wide. The structure, situated to the north of the back wall of the mansion, houses a pump that is part of the water supply system for the mansion house.

Condition. The pumphouse is in good condition. The exterior features of the pumphouse contribute to the historic scene of the Plum Orchard Historic District and must be preserved.